

DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

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TO: Potential Applicants

SUBJECT: 2011 Request for Application (RFA) to designate an eligible entity in San Mateo County (2011-RFA-21)

DATE: February 25, 2011

The Department of Community Services and Development (CSD) announces the release of a Request for Application to designate a new community action agency in San Mateo County to administer the Community Services Block Grant (CSBG) program. CSBG is a federally funded, antipoverty program that is designed to create, coordinate, and deliver an array of services and activities to assist low-income families and individuals achieve self-sufficiency. This solicitation is for private nonprofit organizations providing services to the low-income population in San Mateo County. The forms for the 2011 RFA to designate a new community action agency in San Mateo County are available for download via the CSD web site at www.csd.ca.gov under "CSD Contractors'>CSBG>Announcements". The completed application is due to CSD **by 4:00 P.M. on April 15, 2011.**

A Bidder's Workshop is scheduled on March 18, 2011 to review and discuss the requirements of the CSBG Program. To ensure adequate seating, please submit the Notice of Intent to attend Bidder's Workshop by March 10, 2011. All potential applicants are encouraged to attend the Bidder's Workshop.

The Bidder's Workshop will be held at:

San Mateo County, Human Services Agency
Harvard/Notre Dame Room
400 Harbor Blvd., Building B
Belmont, CA
10:00 a.m. 2:00 p.m.

Any questions regarding this RFA shall be emailed to sanmateorfa@csd.ca.gov . For additional assistance contact Leslie Taylor, at ltaylor@csd.ca.gov or (916) 576-7192.

Sincerely,

Pamela Harrison, Chief
Community Services Division

Enclosure

State of California



Department of Community Services and Development

NOTIFICATION of RELEASE REQUEST FOR APPLICATION (RFA)

For Designation of Eligible Entity

*To serve the
San Mateo County Service Area*

2011-RFA-21

February 2011

Significant Timelines

RFA Released	February 25, 2011
Deadline Date to Submit Notice of Intent to attend Bidder's Workshop	March 10, 2011
Bidder's Workshop	March 18, 2011
Deadline Date to Submit Notice of Intent	March 31, 2011
Last day to submit Questions	April 1, 2011
Deadline Date to Submit Application	April 15, 2011
Proposal Review Period	April 18-May 13, 2011
Notice of Intent to Award Posted at www.csd.ca.gov	May 16 – May 20, 2011
Applicant's Appeal Period	May 16 - May 27, 2011
Final Award	May 31, 2011
Contract Negotiations and Approvals	June 1- 30, 2011
Projected Contract Term*	July 1, 2011 – June 30, 2012

(*Contingent upon designee meeting the statutory requirements, i.e., tripartite board, insurance requirements)

BIDDER'S WORKSHOP

A workshop will be held on **Friday, March 18, 2011 at 10:00 a.m.** in the San Mateo County, Human Services Agency **Harvard/Notre Dame** room located at **400 Harbor Blvd., Building B**, Belmont, CA.

Attendance is highly encouraged. Advance registration is requested. Email the registration form to sanmateorfa@csd.ca.gov to confirm your attendance at the Bidder's Workshop.

Questions regarding this notification can be addressed to:
Leslie Taylor, Project Manager
(916) 576-7192
sanmateorfa@csd.ca.gov

DEPARTMENT OF COMMUNITY SERVICES & DEVELOPMENT

NOTICE OF INTENT TO ATTEND BIDDER'S WORKSHOP

Submit no later than March 10, 2011 by 4:00 p.m.

Organization Name: _____

Address: _____

City: _____ Zip Code: _____

Telephone: _____

Complete the information below for the person(s) attending the Bidder's Workshop. Use additional sheets if needed.

Number of Attendees: _____

Name: _____

Title: _____

Email: _____ Phone: _____

Name: _____

Title: _____

Email: _____ Phone: _____

Send to the attention of:
Leslie Taylor
P.O. Box 1947
Sacramento, CA 95812-1947 or
Email to: sanmateorfa@csd.ca.gov

DEPARTMENT OF COMMUNITY SERVICES & DEVELOPMENT

**NOTICE OF INTENT
TO SUBMIT APPLICATION**

**For the designation of an eligible entity to serve
San Mateo County**

Date: _____

Organization Name (full name): _____

Address: _____

City: _____ Zip Code _____

Telephone: _____

Email: _____

Designated person to sign application (executive director or board chair):

Print name and title

Signature

Please submit no later than March 31, 2011 by 4:00 p.m.

Mail to: Leslie Taylor, Project Manager

P.O. Box 1947

Sacramento, CA 95812-1947 or

Email to: sanmateorfa@csd.ca.gov

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I. ANNOUNCEMENT

The California State Department of Community Services and Development (CSD) announces the opportunity to provide important and life changing services to the low-income populations of San Mateo County by becoming the designated Community Action Agency (CAA) for San Mateo County. This will be facilitated through a Request for Application (RFA) process to provide federal funding to a newly designated CAA to administer the Community Services Block Grant (CSBG) Program.

These funds will be made available in an open competitive Request for Application process. Currently, CSD has budgeted approximately \$382,950 as the CSBG allocation to serve low-income populations in San Mateo County for the period July 1, 2011 through June 30, 2012. Please use this figure when completing Attachment A, CSBG Budget Forms. Funds will be allocated annually thereafter, based on the amount of federal CSBG funding allocated to the State of California.

A. Background

The Economic Opportunity Act of 1964 created Community Action Agencies (CAAs) to administer the federal "War on Poverty" programs in the mid-1960s. The CAA concept continues today under the Coates Human Services Reauthorization Act of 1998, also called the federal CSBG Act (see 42 U.S.C § 9901 *et seq.*), and under California's CSBG Act (see Govt. Code § 12725 *et seq.*). The CSBG Program is administered at the federal level by the Office of Community Services (OCS), which is a branch under the U.S. Department of Health and Human Services. In California, there are 62 organizations designated as "eligible entities" authorized to receive a portion of the CSBG funds allocated to the State. CSD administers these funds and, using a formula allocation, provides the funds to CSBG "eligible entities" that serve low-income individuals and families in all 58 California Counties.

CSBG eligible entities are a network of private non-profit and public agencies. These entities provide a range of services and also integrate and coordinate these services with other organizations. This multi-faceted approach distinguishes CSBG programs from other anti-poverty efforts, and maximizes the likelihood that the individuals and families assisted will become self-sufficient.

Currently, San Mateo County does not have a designated eligible entity to serve the low-income individuals and families under the CSBG program. Once CSD has designated an eligible entity, that organization can provide services in San Mateo County, subject to CSD's ongoing evaluation of the Contractor's performance, availability of funds, and the annual contract renewal process.



B. Geographic Area To Be Served – San Mateo County

There are 20 incorporated cities in the County of Santa Mateo, including: Atherton, Belmont, Brisbane, Burlingame, Colma, Daly City, East Palo Alto, Foster City, Half Moon Bay, Hillsborough, Menlo Park, Millbrae, Pacifica, Portola Valley, Redwood City, San Bruno, San Carlos, San Mateo (the county seat), South San Francisco and Woodside. There are also 17 unincorporated communities including Broadmoor, El Granada, Devenshire, Emerald Lake Hills,

Highlands-Baywood Park, Kings Mountain, La Honda, Loma Mar, Menlo Oaks, Montara, Moss Beach, North Fair Oaks, Pescadero, Princeton-by-the-Sea, San Gregorio, Sky Loma, and West Menlo Park. The County's geography ranges from Daly City in the north to Redwood City in the south and is bordered by San Francisco, Santa Clara, and Santa Cruz counties. The 2009 estimated population was 718,889.

Although San Mateo County is one of the highest median household income counties in both California (third) and the United States (sixteenth), as of 2008, 6.5% of families remain below the poverty level. In 2009, an estimated 2,712 persons were homeless. In 2010, San Mateo County had an unemployment rate of 9.4%. Therefore, in spite of the County's relative affluence, there is a strong need for services. CSD will consider qualified faith-based and private nonprofit organizations, as well as existing eligible entities, in designating an eligible entity to provide services in the San Mateo County Service Area.

C. Eligible Entities

CSD seeks an eligible entity to provide comprehensive services to low-income individuals, families and communities in the San Mateo County Service Area. Applications will be accepted from organizations that meet the qualifications under 676A of Public Law 105-285:

- A private nonprofit organization which may include an eligible entity¹ that is geographically located in San Mateo County and is capable of providing a broad range of services designed to eliminate poverty and foster self-sufficiency.
- A private nonprofit eligible entity that is geographically located in an area contiguous to or within reasonable proximity to San Mateo County and is already providing related services in San Mateo County

Organizations eligible to apply for designation as the eligible entity serving the San Mateo County Service Area must: (1) be a private nonprofit organization (as described above); (2) provide services to low-income persons located within the San Mateo County Service Area, or that is contiguous to the Service Area; (3) demonstrate fiscal and programmatic capacity to provide services designed to eliminate the causes of poverty and foster self-sufficiency, and (4) be governed by a local tripartite (three-part) board.

The term "private, nonprofit organization" also includes religious organizations.

Please note that federal law gives priority to private nonprofit organizations. Therefore, this RFA seeks applications only from those organizations. However, if no private, nonprofit organization is identified or determined to be qualified through this RFA, CSD may designate an appropriate political subdivision of the State or public agency located in San Mateo County to serve as the eligible entity for San Mateo County.

¹ Eligible Entity: an organization that was officially designated as a community action agency or community action program under provisions of the Economic Opportunity Act of 1964; organizations servicing migrant and seasonal farm workers, and agencies by the State.

D. Tripartite Board Requirement (Pursuant to Public Law 105-285 Sec. 676 B. Tripartite Board)

Before CSD can designate any entity as the community action agency for San Mateo County, the entity must be governed by a tripartite board of directors who are seated through a democratic selection process and must meet all of the legal requirements of federal and state CSBG law. The federal statute requires membership of the tripartite board comply with the following:

- ^* 1/3 of the members of the board are elected public officials, holding office on the date of selection, or their representatives.
- ^* not fewer than 1/3 of the members are persons chosen in accordance with democratic selection procedures adequate to assure that these members are representative of low-income individuals and families in the neighborhood served;
 - o and each representative of low-income families selected to represent a specific neighborhood resides in the neighborhood represented by the member.
- ^* the remainder of the members are officials or members of business, industry, labor, religious, law enforcement, education, or other major groups and interests in the community served.

Organizations not currently designated as an eligible entity and willing to restructure their board to meet the tripartite board requirement, may apply and be considered for funding, but will not receive CSBG funds until designated as an eligible entity by CSD.

II. PROGRAM SUMMARY

The purpose of the CSBG program is to reduce poverty, revitalize low-income communities, and empower low-income families and individuals to become fully self-sufficient. This is accomplished by using CSBG funds to support local efforts to identify, reduce, or eliminate the causes of poverty and to help solve problems that block the achievement of economic self-sufficiency. CSBG eligible entities are mandated to focus their efforts on assisting individuals to become self-sufficient, including creating and participating in community revitalization projects that provide enhanced economic opportunities for the target population. CSBG eligible entities also strive for maximum participation of residents of the low-income communities so that they become empowered to respond to the unique problems and needs within their own communities

Organizations receiving CSBG funding are designated as a Community Action Agency (CAA). CAAs must fulfill the following:

- Is governed by a tripartite board composed of representatives of the low-income neighborhoods being served, elected local officials, and key community resources such as business and commerce, faith-based organizations, other service providers and community groups;
- Conducts periodic assessments of the poverty needs and condition within their community and serves as a principal source of information;
- Develops goals and strategies to empower low-income people, reduce poverty, increase self sufficiency, and improve conditions and opportunities within the community that support family stability and advancement;
- Mobilizes and coordinates programs and resources within the organization and by partnering with public and private service providers to achieve family and community improvement goals; and
- Maintains an outcome based system for assessing and reporting the effectiveness of its anti-poverty strategy in terms of results achieved among low-income people and communities.

A. Program Activities

CSBG funds may be used to support activities that are designed to assist low-income, elderly, migrant, or seasonal farm workers, and/or homeless individuals and families.

A CAA provides services based on the needs of the low-income population within its service area. The services and program activities shall target the effects of poverty and positively impact the low-income populations. Services and programs will be designed:

- (i) To remove obstacles and solve problems that block the achievement of self-sufficiency;
- (ii) To secure and retain meaningful employment;
- (iii) To attain an adequate education with particular attention toward improving literacy skills of the low-income families in the communities involved, which may include carrying out family literacy initiatives;
- (iv) To make better use of available income;

- (v) To obtain and maintain adequate housing and a suitable living environment;
- (vi) To obtain emergency assistance through loans, grants, or other means to meet immediate and urgent family and individual needs; and
- (vii) To achieve greater participation in the affairs of the community involved, including the development of public and private grassroots partnerships with local law enforcement agencies, local housing authorities, private foundations, and other public and private partners.

B. Program Reporting

All entities receiving CSBG funds are required to submit the following information and reports to CSD.

1. Community Action Plan

Each eligible entity is required to submit a biennial Community Action Plan (CAP) to CSD that includes a community-needs assessment for the community served.

Note: Upon designation as a CAA, the applicant will be required to submit a community action plan within three (3) months after the start of the contract, and by June 30th of every other year thereafter.

2. CSBG/National Program Indicators (CSD 801) Report

There are six mandated goals for which CSBG entities are required to collect data and report outcomes. The entity designated for San Mateo County will be required to document and report bi-annually and annually the outcomes achieved on the following CSBG National Goals:

Goal 1: Low-income people become more self-sufficient

Goal 2: The conditions in which low-income people live are improved

Goal 3: Low-income people own a stake in their community

Goal 4: Partnerships among supporters and providers of services to low-income people are achieved

Goal 5: Agencies increase their capacity to achieve results

Goal 6: Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems

3. Client Characteristics (CSD 295) Report

Entities are required to capture and report client demographic data on the clients served and report to CSD annually. The entity designated for San Mateo County will be required to document and report annually the demographics for those client served.

4. Fiscal Reports

Entities are required to submit expenditure reports to CSD monthly or bimonthly reflecting actual expenditures.

C. Use of Funds

CSBG funds allow organizations to administer programs that identify, address, and eliminate the causes of poverty. CSBG funds can be used to provide direct assistance to low-income persons, and to assist with the costs of administering other federal, state, and

local programs that provide assistance to the low-income. CSBG funds allow eligible entities to operate a vast array of programs aimed at identifying, ameliorating, and eliminating the causes of poverty and increasing the participation of low-income persons in the activities of their community so that they can assist in solving their own problems.

CSBG funds may not be used for the purchase or improvement of land, or the purchase, construction, or improvement of land, or the purchase, construction or permanent improvement of any building or other facility.

CSBG funds cannot be used in the provision of services or the employment or assignment of personnel in a manner supporting or resulting in programs with any partisan or nonpartisan political activity or any political activity. This also prohibits any activity to provide voters or prospective voters with transportation to the polls or similar assistance in connection with an election or any voter registration activity.

D. CSD Reservations

CSD reserves the right to modify, amend, cancel, or terminate this RFA at any time by issuance of an addendum or notice to all parties who have requested or been mailed an application. **CSD reserves the right to fund none of the applications submitted in response to this RFA.**

III. GENERAL RFA INFORMATION:

A. Questions

Any questions regarding the contents of this RFA shall be in writing and emailed to sanmateorfa@csd.ca.gov by April 1, 2011. When submitting question(s) include the section of the RFA, page number, and other useful information for identifying the specific problem or issue in the questions to be addressed. The deadline for CSD to respond to questions will be April 8, 2011.

B. Bidder's Workshop

Potential applicants are encourage to attend the Bidder's Workshop on March 18, 2011, to obtain information regarding CSBG and the application process. To register, please see the Notice of Intent To Attend Bidder's Workshop form.

C. Notice of Intent to Submit an Application

For the purpose of planning the RFA review process, each prospective applicant must submit a Notice of Intent to Submit an Application signed by the executive director or board chair by March 31, 2011. This notice is not binding and those submitting a notice may elect not to submit an application.

D. Application Submission Information

a) Application Format Criteria

Each application must be single-sided, double-spaced, 8.5 by 11 inches with at least one inch margins, with consecutively numbered pages. Font size should be no smaller than twelve (12) points. An original and **five (5)** copies of the application must be submitted. The original must be marked "original" and contain original signatures.

b) Application Certification

The original application must be signed on the cover page by the applying organization's Executive Director and the Board of Directors' President.

c) Application Deadline

The **deadline** for the receipt and consideration of the application is **4:00 p.m., Friday, April 15, 2011.**

d) Where to Submit Application

Application may be mailed or hand delivered to the addresses below. CSD cannot accept transmission by fax or other electronic methods. Any proposal received after the above specified date and time will not be accepted.

Mailing Address

Department of Community Services and Development
San Mateo County Request for Application
Post Office Box 1947
Sacramento, CA 95812-1947

Street Address

Department of Community Services and Development
San Mateo County Request for Application
2389 Gateway Oaks Drive
Sacramento, CA 95833

E. Disposition of Applications

Upon execution of award, all documents submitted in response to the RFA will become the property of the State of California and will be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) subject to review by the public.

F. CSD's Right to Interview

CSD reserves the right to interview and/or perform site visits to top candidates in order to gather additional information needed to make a selection.

G. Contract Information

Applicant shall agree to comply with the terms and conditions of a contractual agreement with CSD.

H. Notice of Intent to Award

A Notice of Intent to Award shall be posted on May 16, 2011, in a public place in the office of CSD, 2389 Gateway Oaks Drive, Sacramento, CA 95833, and on CSD's website: www.csd.ca.gov. The Notice of Intent to Award will be posted for at least five (5) working days prior to awarding the contract.

IV. APPLICATION REVIEW PROCESS

A two phase selection process will be used to review and/or score submitted applications. An application must successfully meet the minimum requirements in Phase I before moving to Phase II for evaluation review and ranking.

A. Phase I: Minimum Requirements

CSD Staff will review each application for the following: timeliness, completeness, submission of Notice of Intent to Submit an Application form, and initial responsiveness to the minimum Phase I requirements of the RFA.

Applicant must be in good standing with the California Secretary of State's Office.

IF ANY OF THE MINIMUM REQUIREMENTS ARE NOT MET, THE APPLICATION WILL BE NOT BE CONSIDERED.

Phase I: Minimum Requirements

<i>Minimum Requirements Items</i>	Applicants are required to provide one (1) copy of each of the items listed below. An application that does not include the required items will be deemed non responsive <u>and will not be considered any further.</u>	Rating Pass or Fail
1	Organization's Articles of Incorporation	
2	Documentation of organization's current tax exempt status	
3	Evidence that organization is geographically located in San Mateo County or is contiguous to San Mateo County(see Section C: Eligible Entities, paragraph 2) and is already providing services in San Mateo County	
4	Agency Audit – performed within the past two fiscal years, including the management letter and agency response. The audit must have been conducted in compliance with standards adopted by the American Institute of Certified Public Accountant's Government Auditing Standards	
5	Documentation of current fidelity, liability and vehicle insurance	
6	Organizational Chart	
7	Organizational Budget with list of current funding sources and Budget Narrative	
8	Resumes AND duty statements of key staff	
9	List of organizations and agencies that have current partnerships and collaborative relationships with the applicant	
10	Current organization's Board of Directors By-Laws	

11	Current Board Roster indicating the sector represented and local affiliation for each member	
12	Minutes of last 12 months of the Board of Directors' meetings	
13	Applicant's strategic plan, which at minimum establishes goals and objectives for the organization's current programs and describe how the organization plans to meet its goals and objectives	
14	Letters of Support for your organization's application for designation (Limit 5) to be written by organizations and/or individuals who are familiar with the applicant's activities, goals, and community standing	Optional
15	The applicant must disclose if the organization or any of its officers are presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded by any Federal department or agency. An applicant may provide justification documentation that supports its ability to receive federal funding.	If applicable

B. Phase II: Application Narrative Response

An application that meets the above minimum requirement will be submitted for review. Applicants will be awarded a numerical score based on responses to the narrative sections. A maximum of 100 total points can be obtained.

The following information is to be used by the applicant to prepare the narrative response, budget and budget narrative that will be evaluated and scored:

The application narrative must provide all the information requested, when applicable, and follow the order of the outline. The narrative should be formatted with one-inch margins and double spaced 8 ½x11" paper. Font size should be no smaller than 12 point.

Narrative Response		Maximum Possible Points
<i>Each applicant shall use the information in the "Narrative Response" column to prepare the response(s) that will be evaluated and scored. The narrative responses must be clear and detailed and address each of the items listed below. The narrative must not exceed 15 pages.</i>		
A. Capacity of Applicant Organization	<i>Describe your organization's current experience serving the low income community. At a minimum, include the following:</i> <ul style="list-style-type: none">• A brief history of the organization including its mission, current locations and accessibility to the low-income population. Include the organization's experience and ability to deliver services and programs to low-income clients; how the organization serves the ethnic and language groups in its service area, and geographic areas with demonstrated positive outcomes.• A description of the overall staffing and experience of staff in administering programs and working with the low-income population. Explain how the applicant will add staff or expertise to the organization to deliver the programs proposed in this application.• A description of your organization's partnerships, experience, and linkages with other public and private community-based organizations in working with the low-income population. Include how your organization currently involves partners and coordinated collaborative relationships in your service area	20

Narrative Response		Maximum Possible Points
	to maximize service delivery. If your primary service area is outside, but contiguous to San Mateo County, describe how you will build these partnerships and relationships within San Mateo County.	
B. Fiscal Controls	<p>Describe your organization's experience in maintaining fiscal controls. At a minimum address the following:</p> <ul style="list-style-type: none"> • How your organization follows sound fiscal management principles and procedures in administering grants to ensure proper checks and balances. Include the process for the board to review the fiscal policies and procedures and when they were last updated and approved by the board; • A description of the organization's experience in managing federal grants; • Any loss of public or private funding for failure to meet grant or contract requirements; • Any findings or "going concerns" in the submitted agency-wide audit within the past two fiscal years. <p><i>Note: In Section V, item 4 above, Minimum Requirement Items, the required audit will be reviewed to demonstrate the organization's fiscal accountability, soundness, and viability. This review will look for a positive fund balance, any losses, material findings, and statements regarding "a going concern".</i></p>	25
C. Board Composition	<p>Describe the composition of the board. At a minimum include the following:</p> <ul style="list-style-type: none"> • How your organization uses a tripartite board to represent as many groups or needs as possible in the San Mateo area. If your organization does not currently have a tripartite board which includes representation from within San Mateo County, provide a detailed plan for establishing a tripartite board. • Describe the board's active involvement in planning, implementation, program evaluation, and fiscal management. 	10
D.	Describe your organization's program(s)	30

Narrative Response		Maximum Possible Points
Applicant Program Experience	<p>and ability to assess the needs of the community. At a minimum include the following:</p> <ul style="list-style-type: none"> • The current types of programs administered, funding amounts and funding sources allocated for each program, current service area(s), target populations served and the total number of clients served annually. Include the number of clients that achieve self-sufficiency annually. • How the organization conducts assessments that involve community input on determination of low-income services, how the organization provides outreach, identifies clients and integrates services with other community resources. • Describe how client information and data is collected by the organization to evaluate individual client success and program effectiveness. Explain how this data is used to set goals, measure and track the outcomes of services provided. List any ongoing formal reports completed by your organization which utilize this data and are submitted to local, state or federal governments. • Describe how the funds and the designation as a CAA will assist in developing new or expanding program services and delivery strategies, outreach, or other approaches in assisting low-income clients achieve self sufficiency. 	
E. Budget and Budget Narrative	<p>Prepare a budget, a description of current funding sources, and a budget narrative. At a minimum include the following:</p> <ul style="list-style-type: none"> • A budget using the format in Attachment A, CSBG Budget Forms, detailing how CSBG funds will be expended. Costs should be necessary and reasonable for carrying out the proposed services. The Applicant shall submit a list of "Other Agency Operating Funds" as requested on the budget summary form (CSD 425 S) Section 70 (see attachment A: CSBG Budget Forms). If the applicant is awarded the contract, this budget will become the basis for negotiating the actual contract budget. 	15

<i>Narrative Response</i>		<i>Maximum Possible Points</i>
	<ul style="list-style-type: none"> • A description of your current funding sources and the services provided with the funds and how the CSBG funds will be integrated into your current method of service delivery to expand programs and resources. • A budget narrative to explain how each line item cost is determined. <i>The budget forms and budget narrative does not count in the 15 page narrative limit.</i> 	

V. EVALUATION AND SCORING CRITERIA

Phase I: Minimum Requirements

Phase I documents will receive a "Pass" or "Fail" rating. Each applicant is required to submit all applicable documents (1 – 15) listed under Minimum Requirements. If applicant fails to submit the required documents, the application will not continue to Phase II of Section IV for evaluation or scoring.

Phase II: Applicant Narrative Response

Each application receiving a score of "pass" in Phase I will be eligible to be evaluated and scored in Phase II. Each application will be reviewed by multiple reviewers, first individually, then collaboratively. *The exact number of reviewers has not been determined at this but will not be less than three and no more than five. Reviewers will be individuals familiar with CSD's work and the goals and objectives of the federal CSBG program.*

Reviewers will review each application and assign a point value, ranging from 0 to the number of "Maximum Points" allowed, to each of the narrative items. After discussion within the evaluation panel, individual scores will be added to arrive at each proposal's total points.

The points awarded by each reviewer will be averaged, based on the number of reviewers. The results of that average will be the final score.

Summary of Narrative Response Sections	Maximum Points
A. Capacity of Applicant Organization	20
B. Fiscal Controls	25
C. Board Composition	10
D. Applicant Program Experience	30
E. Budget and Budget Narrative	15
Total Maximum points	100

VI. ADDITIONAL INFORMATION

Those organizations unfamiliar with the Community Services Block Grant administered by CSD can review the following documents by accessing them from the CSD website:

- a. Go to www.csd.ca.gov click the 'CSD Contractors' tab, click 'CSBG' tab, click '2011 San Mateo County Designation RFA'
 - i. Community Services Block Grant Act, 42 U.S.C., Section 9901 et seq.
 - ii. Government Codes Sections 12725-12790, California Community Services Block Grant Program
 - iii. 2011 CSBG Boilerplate Contract
 - iv. National Performance Indicators Instruction Manual (As Updated May 2009)
 - v. 2012 – 2013 Community Action Plan Format

VII. APPEAL PROCESS

- A. Only an original applicant whose application was evaluated may appeal the Notice of Intent to Award posted by CSD. There are no appeal rights for applications that are submitted late, are noncompliant, or are incomplete.
- B. A contract award may be delayed when an appeal is received by CSD. CSD will not award a contract until the appeal is withdrawn or CSD has rendered a decision.
- C. A Notice of Intent to Appeal must be filed in writing and received by CSD within five (5) working days after the Notice of Intent to Award is posted on CSD's website. The Notice of Intent to Award is expected to be posted and noticed between **May 16-20, 2011**. For this RFA, **the Notice of Intent to Appeal must be received by CSD on or before May 20, 2011 by 5:00 p.m.** Appeals may be mailed, faxed or hand delivered to:

***Ramonda Ramos, CSBG Appeals Coordinator
Department of Community Services and Development***

**Mailing Address
P.O Box 1947
Sacramento, CA 95812-1947**

**Street Address
2389 Gateway Oaks Drive
Sacramento, CA 95833
(916) 576-1852 (Telephone)
(916) 263-1406 (Fax)**

- D. After filing a Notice of Intent to Appeal, the appellant will have five (5) calendar days from the date of its filing to file a detailed written statement of the appeal if the Notice of Intent to Appeal did not contain the complete grounds for appeal. Appeals shall be limited to the grounds that CSD failed to correctly apply the standards for reviewing the format requirements or evaluating the applications as specified in the RFA.
- E. **The detailed written appeal can only be filed if a Notice of Intent to Appeal was previously received by CSD on or before May 20, 2011 by 5:00 p.m.**
- F. Andrew Signey, Acting Director of CSD or his designee may hold an oral hearing and render a decision based on the content of the written appeal letter and the hearing. The decision of Andrew Signey, Acting Director, or his designee shall be final. There is no further administrative appeal.
- G. Appellants will be notified in writing of the decision regarding their appeal within ten (10) working days of the hearing date or the consideration of the written appeal letter, if no hearing is conducted.

APPLICATION STACK ORDER CHECKLIST

The application elements and attachments must be assembled in the order listed below. Failure to attach required documents and/or failure to provide appropriate signatures where applicable shall be cause for an application to be deemed non-responsive and disqualified. Please see 'Phase I: Minimum Requirements' for more detail on each of the required attachments.

ATTACHMENTS AND STACK ORDER

Please check each box when completed.

- ☐ Signed Application Cover Page
- ☐ Numbered Table of Contents
- ☐ Application Narrative (Limit 15 pages)
- ☐ CSBG Program Budget
- ☐ CSBG Budget Narrative (Does not count in the 15 page narrative limit)

ORGANIZATIONAL CAPABILITY DOCUMENTS AND STACK ORDER

Please check each box when completed.

- ☐ Organization's Articles of Incorporation
- ☐ Documentation of organization's current tax exempt status
- ☐ Evidence that organization is located in or contiguous to San Mateo County
- ☐ Agency Audit
- ☐ Current fidelity, liability and vehicle insurance
- ☐ Organizational Chart
- ☐ Organizational Budget with list of current funding sources and Budget Narrative
- ☐ Resumes and Duty Statement of Key Staff
- ☐ List of Current Partnerships and Collaboratives
- ☐ Current Organization's Board of Directors By-Laws
- ☐ Current Board Roster
- ☐ Board Minutes – Past twelve months
- ☐ Strategic Plan

LETTERS OF SUPPORT–OPTIONAL

- ☐ Letters of Support (Limit 5)

DISBARMENT DISCLOSURE–IF APPLICABLE

- ☐ Documentation of any disbarment or suspension by any federal department or agency

ATTACHMENT A

2011 U.S. Department of Health and Human Services Poverty Guidelines

2011 HHS Poverty Guidelines			
Persons in Family	48 Contiguous States and D.C.	Alaska	Hawaii
1	\$10,890	\$13,600	\$12,540
2	14,710	18,380	16,930
3	18,530	23,160	21,320
4	22,350	27,940	25,710
5	26,170	32,720	30,100
6	29,990	37,500	34,490
7	33,810	42,280	38,880
8	37,630	47,060	43,270
For each additional person, add	3,820	4,780	4,390

ATTACHMENT B
APPLICATION FOR DESIGNATION OF ELIGIBLE ENTITY

APPLICATION FOR DESIGNATION OF ELIGIBLE ENTITY
2011-RFA-21
Application Cover Page
COMMUNITY SERVICES BLOCK GRANT PROGRAM
SAN MATEO COUNTY

Agency Name

Mailing Address (Street address, City, State, Zip Code)

Person authorized to act as the contact for this organization in matters regarding this application:

Printed Name (First, Last)

Title:

Telephone number:

()

Email address:

Fax Number:

()

Signature

Date

Name/Title of person authorized by the Board Of Directors to sign this application on behalf of the Board:

Printed Name (First, Last)

Title:

Telephone number:

()

Email address:

Fax Number:

()

Signature

Date

Executive Director or Chief Operating Officer :

Printed Name (First, Last):

Title:

Telephone number:

()

Email address:

Fax Number:

()

Signature

Date

By submitting this application, the applicant signifies the acceptance of the responsibility to comply with all grant requirements in this RFA and in accordance with applicable Federal and State statute(s). The applicant understands that CSD is not obligated to fund the project until the applicant submits complete and accurate documents required for the contract agreement.

ATTACHMENT C

CSBG BUDGET FORMS

**ATTACHMENT I
CSBG CONTRACT BUDGET SUMMARY**

Contractor Name:	Contract Number:	Contract Amount:
Prepared By:	Contract Term:	Amendment #:
Telephone #:	Fax Number:	
Date:	E-mail Address:	

SECTION 10: ADMINISTRATIVE COSTS

Line Item	Description	CSBG Fund (rounded to the nearest dollar)
1	Salaries and Wages	
2	Fringe Benefits	
3	Operating Expenses	
4	Equipment	
5	Out-of-State Travel	
6	Subcontractor Services	
7	Other Costs:	
Subtotal Section 10: Administrative Costs (cannot exceed 12% of the agency Total Operating Budget in Section 80)		

SECTION 20: PROGRAM COSTS

Line Item	Description	CSBG Funds (rounded to the nearest dollar)
1	Salaries and Wages	
2	Fringe Benefits	
3	Operating Expenses	
4	Equipment	
5	Out-of-State Travel	
6	Subcontractor Services	
7	Other Costs:	
Subtotal Section 20: Program Costs		

SECTION 40: Total CSBG Budget Amount (Sum of Subtotal Sections 10 and 20)

SECTION 70: Enter Other Agency Operating Funds Used to Support CSBG

SECTION 80: Agency Total Operating Budget (Sum of Sections 40 and 70)

SECTION 90: CSBG Funds Administrative Percent (Section 10 divided by Section 80)

INSTRUCTIONS

ATTACHMENT I CSBG – CONTRACT BUDGET SUMMARY CSD 425.S (Rev. 12/1/2009)

Enter the identifying information requested at the top of the report form: contractor's name, contract number, contract amount, contract term, and amendment number (*if applicable*). Enter the preparer's name, telephone number, fax number, date, and e-mail address.

SECTION 10: ADMINISTRATIVE COSTS:

Any Costs directly related to the administration of the CSBG contract.

Lines 1 through 7: Enter the total CSBG amount budgeted for each line item.

1. Salaries & Wages

Provide the total dollar amount of salaries and wages dedicated to staff performing administrative duties. Includes all payments made to administrative staff, permanent or temporary, as well as all regular and overtime pay, as approved by the contract authority.

2. Fringe Benefits

Provide the total dollar amount of fringe benefits for staff performing administrative duties. Include all payments made in accordance with approved payroll benefit programs. This includes retirement/pension plans and various other forms of insurances related to employee compensation such as disability, life, health and unemployment. Additionally, payroll taxes, workers' compensation, disability insurance, sick leave and accrued vacation should be included.

3. Operating Expenses

Provide the total dollar amount for all administrative operating expenses related to CSBG programs. All items must be listed on the CSD 425 1.2 budget support-non personnel cost form. Examples of administrative operating expenses include:

- In-state travel costs
- Building costs (such as rental & lease fees)
- Consumable supply costs
- Utility costs
- Administrative operating costs (such as telephones, building alarms, maintenance, etc)
- Supply costs (such as printing, duplication, postage, etc)
- Insurance costs not related to personnel insurance costs
- Additional fees related to the administration of the CSBG ARRA Program (such as staff trainings, membership dues, costs incurred due to Board meetings, subscriptions, etc)
- Funds spent on contractor/consultant services to meet administrative needs in this area

4. Equipment

Provide the total dollar amount for all administrative equipment expenses related to CSBG ARRA program. Examples of administrative equipment expenses include:

- All equipment/lease purchases dedicated to administrative needs

INSTRUCTIONS

ATTACHMENT I CSBG – CONTRACT BUDGET SUMMARY CSD 425.S (Rev. 12/1/2009)

List all Equipment/Lease costs on the CSBG Budget Support – Non Personnel Cost CSD 425.1.2 with the detailed information.

5. Out-of-State Travel

Provide the total dollar amount of travel costs, excluding personnel costs related to administrative tasks incurred during travel outside of the State of California. Complete CSBG Budget Support – Non Personnel Cost CSD 425 1.2 with the name of the conference, location, and cost per trip.

6. Subcontractor Services

Provide the total dollar amount administered to any subcontracting agencies that provide administrative services.

List all subcontractor costs on the CSBG Budget Support – Non Personnel Cost CSD 425 1.2 with the detailed information. Include the subcontractor name and total amount of contract.

7. Other Costs

Provide a list of all other administrative costs that do not fit in the above categories, including but not limited to any funds directed towards:

- IT Development. IT Development includes only projects in the development phases. Costs of IT projects in use should be included in Operating Expenses & Equipment above.
- Audit, Legal and Lobbying Costs: As defined by the Cost Principles in OMB Circular A-122.
- Indirect Costs. The indirect cost rate is defined as the dollar value of the approved federal rate and the entire amount can be claimed as long as it is not reimbursed by another funding source. Please note that if indirect costs are reported the approved Indirect Cost Rate Plan must be submitted.

SUBTOTAL SECTION 10 (Administrative Costs): Enter the sum of line items 1 through 7 for CSBG funds. (Cannot exceed 12% of the agency total operating budget in Section 80)

SECTION 20: PROGRAM COSTS:

Those costs incurred that are not related to the administrative costs reported above, but are directly related to the operation of the program.

Lines 1 through 7: CSBG FUNDS: Enter the total amount budgeted for each of the line items.

1. Salaries and Wages

Provide the total dollar amount of salaries and wages dedicated to staff performing programmatic support activities. Include all payments made to programmatic staff, permanent or temporary, as well as all regular and overtime pay, as approved by the contract authority.

INSTRUCTIONS

ATTACHMENT I CSBG – CONTRACT BUDGET SUMMARY CSD 425.S (Rev. 12/1/2009)

2. Fringe Benefits

Provide the total dollar amount of fringe benefits dedicated to staff performing programmatic support duties. Include all payments made in accordance with approved payroll benefit programs. This includes retirement/pension plans and various other forms of insurances related to employee compensation such as disability, life, health and unemployment. Additionally, payroll taxes, workers' compensation, disability insurance, sick leave and accrued vacation should be included.

3. Operating Expenses

Provide the total dollar amount for all programmatic operating expenses linked with CSBG programs. Include:

- In-state travel costs related to programmatic costs
- Building costs related to programmatic operation (such as rental & lease fees)
- Consumable supply costs
- Programmatic operating costs (such as telephones, building alarms, maintenance, etc)
- Programmatic supply costs (such as printing, duplication, postage, etc)
- Additional fees related to the programmatic operation of the CSBG Program
- Funds spent on contractor/consultant services to meet programmatic needs in this area

4. Equipment

Provide the total dollar amount for all programmatic equipment expenses linked with CSBG programs. Include, equipment/lease purchases dedicated to programmatic needs.

List all Equipment/Lease costs on the CSBG Budget Support – Non Personnel Cost CSD 425 1.2 with the detailed information.

5. Out-of-State Travel

Provide the total dollar amount of travel costs related to programmatic tasks incurred during travel outside of the State of California. Complete CSBG Budget Support – Non Personnel Cost CSD 425 1.2 with the name of the conference, location, and cost per trip.

6. Subcontractor Services

Provide the total dollar amount paid to any subcontracting agencies that provide programmatic services. List all subcontractors services on the CSBG Budget Support – Non Personnel Cost CSD 425 1.2 with the detailed information. Include the subcontractor name and total amount of contract.

7. Other Costs

Provide a list of all other programmatic costs that do not fit in the categories above, including but not limited to funds directed towards:

- Direct Client Purchases. Include all direct purchases made with CSBG dollars for items designated specifically for client use.

INSTRUCTIONS

ATTACHMENT I CSBG – CONTRACT BUDGET SUMMARY CSD 425.S (Rev. 12/1/2009)

SUBTOTAL SECTION 20 (Program Costs):

Enter the sum of line items 1 through 7 for CSBG funds.

SECTION 40: Total CSBG Budget Amount:

Enter the sum of Subtotal Sections 10 and 20. The amount shall not exceed the total CSBG allocated amount.

SECTION 70: Other Agency Operating Funds Used to Support CSBG:

Provide the total operating funds used to support the CSBG program administered by the tripartite board. For public community action agencies, all funds under the administration of the advisory or administrative tripartite board should be considered as community action program operating funds. **Prepare and attach a detailed list identifying all other funding sources and amounts that make up the total annual operating budget of the community action program(s).**

SECTION 80: Agency Total CSBG Operating Budget:

The sum of Section 40 (Total CSBG Budget Amount) and Section 80 (Other Agency Operating Funds Used to Support CSBG).

SECTION 90: CSBG Funds Administrative Percent:

Divide Section 10: Administrative Costs by Section 80: Agency Total Operating Budget. This percentage cannot exceed 12% of the community action program's total operating budget.

ATTACHMENT I
CSBG BUDGET SUPPORT -- PERSONNEL COSTS

Contractor Name:	Contract Number:	Contract Amount:
Prepared By:	Contract Term:	Amendment #:
Telephone #:	Fax Number:	
Date:	E-mail Address:	

Section 10 -- ADMINISTRATIVE COSTS -- SALARIES AND WAGES

A	B	C	D	E	F
No. of Positions	Position Title	Total Salary for each position	Percent (%) of CSBG time allocated for each position	Number of CSBG months allocated for each position	Total CSBG Funds budgeted for each position
Total (must match Section 10: Administrative Costs on the CSD 425.S Budget Summary form)					

SECTION 20 -- PROGRAM COSTS -- SALARIES AND WAGES

	FTE	RATE	TOTAL SALARY	BENEFITS AND WAGES	
Total (must match Section 20: Program Costs on the CSD 425.S Budget Summary form)					

FRINGE BENEFITS

Enter description of Fringe Benefits. Please include the percentage of Salaries and Wages paid in Benefits. (Examples: FICA, SSI, Health Ins., Workers Comp. Etc.)		Section 10 Administrative Costs	Section 20 Program Costs
	Percentage	List CSBG funds Budgeted Line 2	List CSBG Funds Budgeted Line 2
TOTAL MUST MATCH THE AMOUNT ENTERED ON CSD 425.S (BUDGET SUMMARY)			

ATTACHMENT I
CSBG BUDGET SUPPORT—PERSONNEL COSTS
CSD 425 1.1 (Rev. 12/1/2009)

Enter the identifying information requested at the top of the report form: contractor's name, contract number, Contract amount, contract term, and amendment number (*if applicable*). Enter the preparer's name, telephone number, fax number, date, and e-mail address.

ADMINISTRATIVE and PROGRAM COSTS – SALARIES AND WAGES:

Complete Section 10: Administrative Costs and Section 20 Program Costs for those costs which are directly related to CSBG contract. Provide the specific positions for the salaries and wages (Budget Summary 902 S) and Fringe Benefits (Budget Summary 902 S).

Column A: Number of Positions

Specify the number of positions for each Position Title in Column B that are directly related to the administrative (Section 10) and/or program (Section 20) costs of the CSBG contract.

Column B Position Title

Specify the position title. Do not abbreviate.

Column C: Annual Salary for each position

Specify the total dollar amount of salaries and wages for staff performing CSBG administrative and/or program activities. Include all payments made to administrative/program staff, permanent or temporary, as well as all regular and overtime pay, as approved by the contract authority.

Column D: Percent (%) of CSBG Time allocated for each position

Specify the amount of time (in percent) for the position dedicated to the CSBG administrative and/or program activities.

Column E: Number of CSBG months allocated for Each Position

Specify the number of months allocated for each position listed in Column A.

Column F: Total CSBG funds budgeted for each position

Calculate the totals (See page 2).

Fringe Benefits

Specify the total dollar amount of fringe benefits for staff performing administrative and/or program duties. Include all payments made in accordance with approved payroll benefit programs. This includes retirement/pension plans and various other forms of insurances related to employee compensation such as disability, life, health and unemployment. Additionally, workers' compensation, disability insurance, sick leave and accrued vacation should be included.

ATTACHMENT I
CSBG BUDGET SUPPORT—PERSONNEL COSTS
CSD 425 1.1 (Rev. 12/1/2009)

Listed below are the formulas to calculate Annualized Salary, Percentage of CSBG Time, Number of CSBG Months, and CSBG Funds:

Annualized Salary: CSBG Funds multiplied by 12 months divided by number of months divided by Percentage (%) of time.

Percentage of CSBG Time: CSBG Funds times 12 months divided by the number of Months divided by annualized salary.

Number of Months: CSBG Funds times 12 months divided by percentage of time divided by annualized salary.

CSBG Funds: Annualized Salary divided by 12 months multiplied by the number of months times percentage (%) of time.

ATTACHMENT I
CSBG BUDGET SUPPORT -- NON PERSONNEL COSTS

Contractor Name:	Contract Number:	Contract Amount:
Prepared By:	Contract Term:	Amendment #:
Telephone #:	Fax Number:	
Date:	E-mail Address:	

Hit Alt & Enter at the same time to begin a new line or paragraph within the cell.

EXPLAIN AND JUSTIFY EACH LINE ITEM Totals must match CSD 425.S Budget Summary form Attach additional sheet(s) if necessary Missing descriptions shall result in delay of the contract execution.	CSBG			
	Section 10 Administrative Costs		Section 20 Program Costs	
List all Operating Expenses	3	sum should equal total on line item 3 of CSD 425.S Budget Summary form	3	sum should equal total on line item 3 of CSD 425.S Budget Summary form
List all Equipment Purchases	4	sum should equal total on line item 4 of CSD 425.S Budget Summary form	4	sum should equal total on line item 4 of CSD 425.S Budget Summary form
List all Out-of-State Travel: Name of conference; Specify location; Cost per trip	5	sum should equal total on line item 5 of CSD 425.S Budget Summary form	5	sum should equal total on line item 5 of CSD 425.S Budget Summary form
List all Subcontractor Services	6	sum should equal total on line item 6 of CSD 425.S Budget Summary form	6	sum should equal total on line item 6 of CSD 425.S Budget Summary form
Other Costs - Explain & Justify each line item (i - iv): Any additional Other Costs (attach additional sheet if necessary):	Section 10 Administrative Costs		Section 20 Program Cost	
i				
ii				
iii				
iv				
Total Other Costs (Sum of i, ii, iii, iv):	7	sum should equal total on line item 7 of CSD 425.S Budget Summary form	7	sum should equal total on line item 7 of CSD 425.S Budget Summary form

**ATTACHMENT I –
CSBG BUDGET SUPPORT – NON PERSONNEL COSTS
CSD 425 1.2 (Rev. 12/1/09)**

Enter the identifying information requested at the top of the report form: contractor's name, contract number, Contract amount, contract term, and amendment number (*if applicable*). Enter the preparer's name, telephone number, fax number, date, and e-mail address.

List those costs which are directly related to the **Administrative** (Column A) and/or **Program** (Column B) of the CSBG contract. All totals must equal the budget summary CSD 425.S.

List all Equipment Purchases Services:

Provide a detailed list of all equipment purchases; include type of equipment and the amount (e.g. copy machine, \$6,500).

List all Contract & Consultant Services:

Provide a detailed list of the contract and consultant services. Include: the name and amount of the each contract (e.g., strategic planning consultant, \$8,500).

List all Out-of-State Travel Only:

Provide detailed information for each out of state travel trip; include location, purpose of each trip, and related costs per trip (e.g., Chicago, IL, CAP Law Conference, \$1500).

List all Subcontractor Services:

List the subcontractor name and total dollar amount administered to any subcontracting agencies that provide services (e.g., Youth Employment Training Agency, \$20,000).

Other Costs

Please provide a list of all other administrative (Section 10) and program (Section 20) costs that do not fit in the above categories. Attach additional sheets if necessary.

- i. Any additional Other Costs: List the additional other costs that do not fit in any other category.
- ii. Direct Client Purchases: List all direct client purchases, include the item name, the number purchased, and the cost (e.g. thermal blankets, qty. 3000, cost \$12,000).
- iii. Indirect Costs: The indirect cost rate is defined as the dollar value of the approved federal rate, and the entire amount can be claimed as long as it is not reimbursed by another funding source. Please note that if indirect costs are reported, the approved Indirect Cost Rate Plan must be accompany budget forms.
- iv. Information Technology (IT) Development: IT Development includes only projects in the development phases. Costs of IT projects in progress should be included in Operating Expenses above.

Total Other Costs (sum of i, ii, iii, iv)